An Introduction to Eagle Viewers

As you become more familiar with the system, you'll notice that it presents much of the information you look up in viewers.

Whether you work with inventory, orders, Accounts Payable, saved transactions, customer information, or general business data, you are going to be dealing with one or more viewers.

Even if the word Viewer isn't located in the title bar, if the system presents information in a grid, it's a viewer.

That's good news, because, if everything is a viewer, you can apply what you know about viewers and grids to whatever viewer you open in the system.

Pick a topic and we'll get started.

Topics

- Create a Viewer
- Customize a Viewer
- Save a Viewer

Create a Viewer

When you open a viewer, it's a blank slate waiting to fill.

You get to choose the data you want to display in the grid and how it's presented.

The end result is a view.

Let's open the Inventory Viewer as an example.

If you're already in Inventory Maintenance, select the Viewer icon in the ribbon. Otherwise, you can open the viewer from the applications pane on the home page or type VIEWIN in the Launch bar.

Right away, you notice the grid area along with column headers.

You can sort and filter the information as needed.

Keep in mind that the system does not always label viewers as such.

Any time you see a grid with column headers, like this one on the Vendor tab of Inventory Maintenance, or the Posting screens of Purchasing and Receiving and Point of Sale, you'll know that the screen has the same grid functionality of a viewer even if it's not called a viewer.

While options vary from viewer to viewer, the process is always the same: You start by selecting how you want to look up information.

To select the information to display, press Change Lookup and select how you want to find the information. The Inventory Viewer uses item groupings such as department or class.

Other viewers have their own lookup options.

Once you've picked a lookup method, use the selection box, here, to refine it. Then press Refresh to add the results to the grid.

If there are a lot of records to be added to the grid, you may see a message saying that a certain number of records have been added. You have the choice to stop there or continue loading all the records.

Customize a Viewer

To change the lookup, use the dropdown list again, or start over again from the Lookup window.

Then Refresh the screen to see the new information you've loaded into the viewer.

Once the information is in the viewer, you have many options for customizing the data.

We call this creating a view.

The column headers hold most of the options for customizing the view. Notice that when you move your cursor over a column header, a plus sign displays.

When you see this, you can right-click to view the options for the column.

One of the most useful options when creating a new view is Select Columns to View.

Choosing this opens a window that allows you to choose which columns you want to appear in the grid.

For instance, you may want to display the Posting Quantity column so you can post multiple items from the Inventory viewer to Point of Sale or a Purchase Order.

Once you have the columns you want in the grid, you can drag them to any position within the grid.

Alerts allow you to change the color of the cells in the selected column based on parameters that you select.

For instance, in the Inventory Viewer, you may want an alert when the Quantity on Hand falls below a certain level.

With this view open, you'd be able to see at a glance which inventory items to order.

To create an Alert in a Viewer, right click on the column header.

Select Set Alerts On.

Choose your color: Red, Yellow, or Green.

Enter your criteria. In this case, we want to see a Quantity on Hand Less than two.

Select Set Alert.

Use one of the Clear Alerts options to remove alerts from a selected column or from all columns.

Sometimes, you'll want the ability to select specific rows in a grid. This is handy when you want to export only some of the data from a viewer. To do this, you'll use checkboxes.

If checkboxes aren't already available, you can add them by right-clicking any column header and selecting that option.

You can then enable a checkbox to select a row. Right clicking the checkbox column gives you options specific to checkboxes, such as viewing only selected rows.

If you want to select a number of items, and you don't want to check each box, here's a tip.

Enable the first checkbox you want, hold down the Shift key on your keyboard, then enable the last checkbox.

The system enables all items in between the two boxes you checked.

To quickly sort the information in a column from low to high values, just double-click the column header.

Double-clicking again reverses the order, from high to low.

You have other sorting, filtering, and graphing options available by right-clicking the column header, including options that give you totals, subtotals, and averages.

If you need to resize a column to view the data, you can drag the vertical line at the edge of the header, or you can select Autosize in the Column options.

Finally, use the Control Panel option if you want to export the grid data in another format, such as a spreadsheet or html.

The Control Panel also has printing and viewing options.

You may also notice a toolbar at the bottom right of the screen. You can use these icons to increase or decrease the size of the grid, print the grid, or export the data to Excel.

Save a Viewer

After taking the time to set up a customized view, think about whether you will ever want to use it again. Chances are, you will.

If so, you don't want to take the time to re-create all the work you just did.

Luckily, you won't have to because the system lets you save the custom view and recall it to use it over and over again.

To save a view, choose File and select Save View.

If you've created a highly customized view, you may see a window that asks how much you want to save.

Choose from options that allow you to save only the layout up to saving everything in the view, including filtering and sorting parameters.

The first choice is the most general.

The last choice is the most specific.

The ones in between offer options.

As a best practice, choosing the last option reproduces your saved view the way you left it, but with updated data.

Select OK.

Type a name for the view in the Description box.

Keep in mind that it's much better to come up with a unique name than to overwrite a default view.

Press Enter to save the view.

Once saved, you can open the view whenever you need it.

Simply open the File menu and select Load View.

Locate the name of the view you need, select it, and press Enter or choose Open.

Then you're off and running!

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